

Driving More Leads with HubSpot

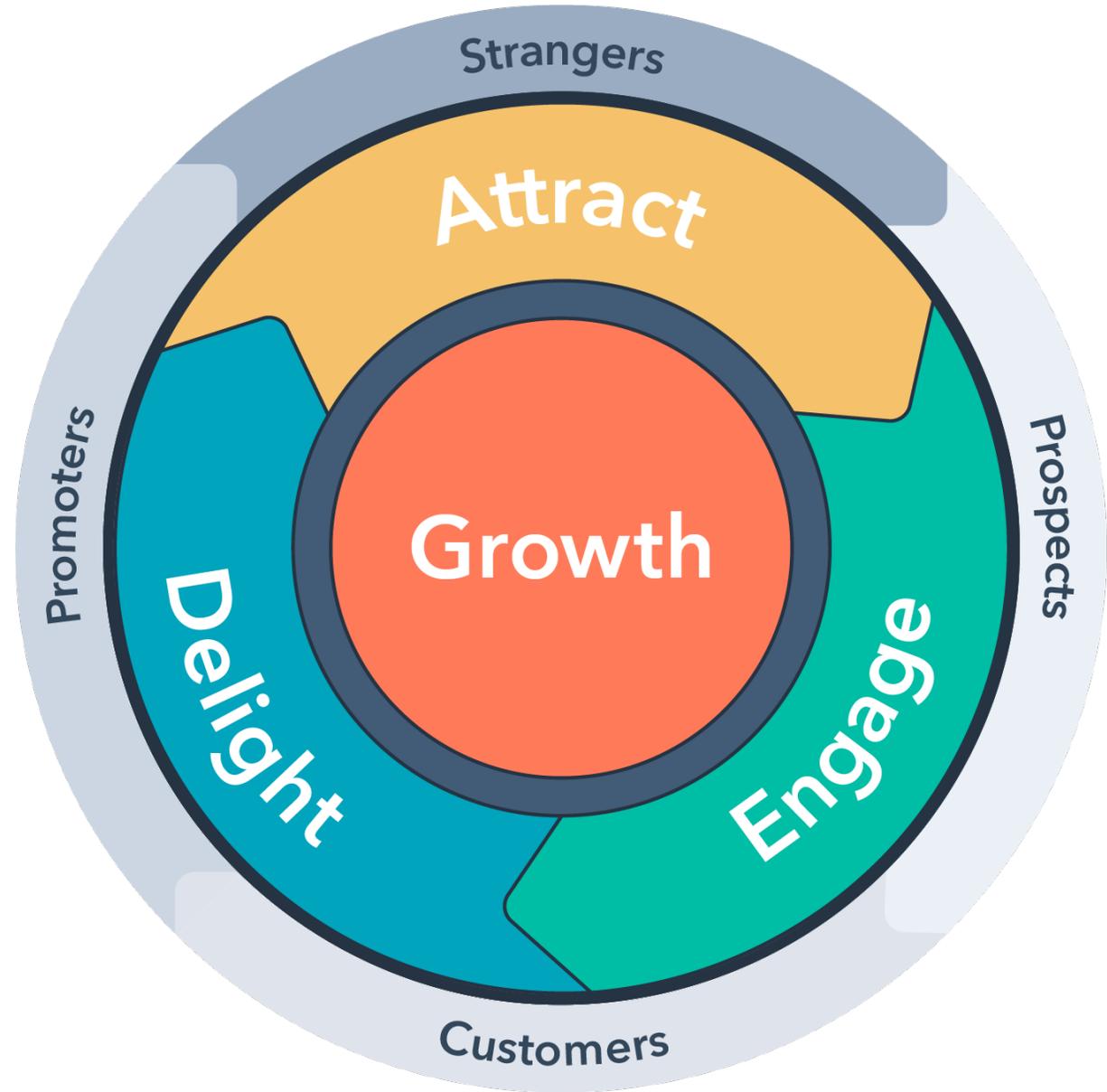
SIMPLE STRAT

FLYWHEEL FUEL SERIES



Flywheel Fuel Series

Help you create the fuel you need to power your flywheel



Objectives

- Learn effective methods to generate more leads using HubSpot's suite of tools and features, covering everything from content marketing to email campaigns and beyond
- Explore a framework that will help you identify opportunities and rate by level of effort and impact
- Review real-life examples and case studies that show these ideas in action



Simplify Growth

With HubSpot and the expertise to use it to its full potential.



Buy
HubSpot



Fix
HubSpot



Put HubSpot
to Work

- HubSpot Management -
- Marketing Support -



Implement
HubSpot



Learn
HubSpot



Getting More Leads



SHOW ME THE

LEADS!!!!!!!

First, let's get on the same page!

- Lead generation: The process of attracting and converting prospects interested in your brand, product, or service

Lead Conversions:

- Visitor to subscriber
- Subscriber to lead
- Lead to MQL
- MQL to SQL
- SQL to Opportunity

This gets really messy to define because it depends on your strategy.

LEAD

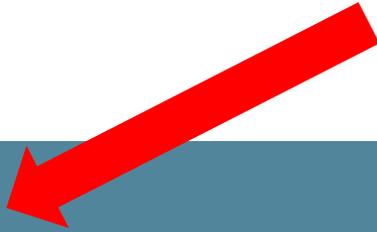
- Qualified contacts that fit your ICP
- Inside or outside your CRM

MQL

- Contacts who have engaged with your marketing efforts but aren't ready to talk to sales

SQL

- Contacts who have taken actions that indicate their interest in becoming a paying customer



Another Way to Look at It:

- Suspect to Prospect
- Prospect to Lead
- Lead to Opportunity

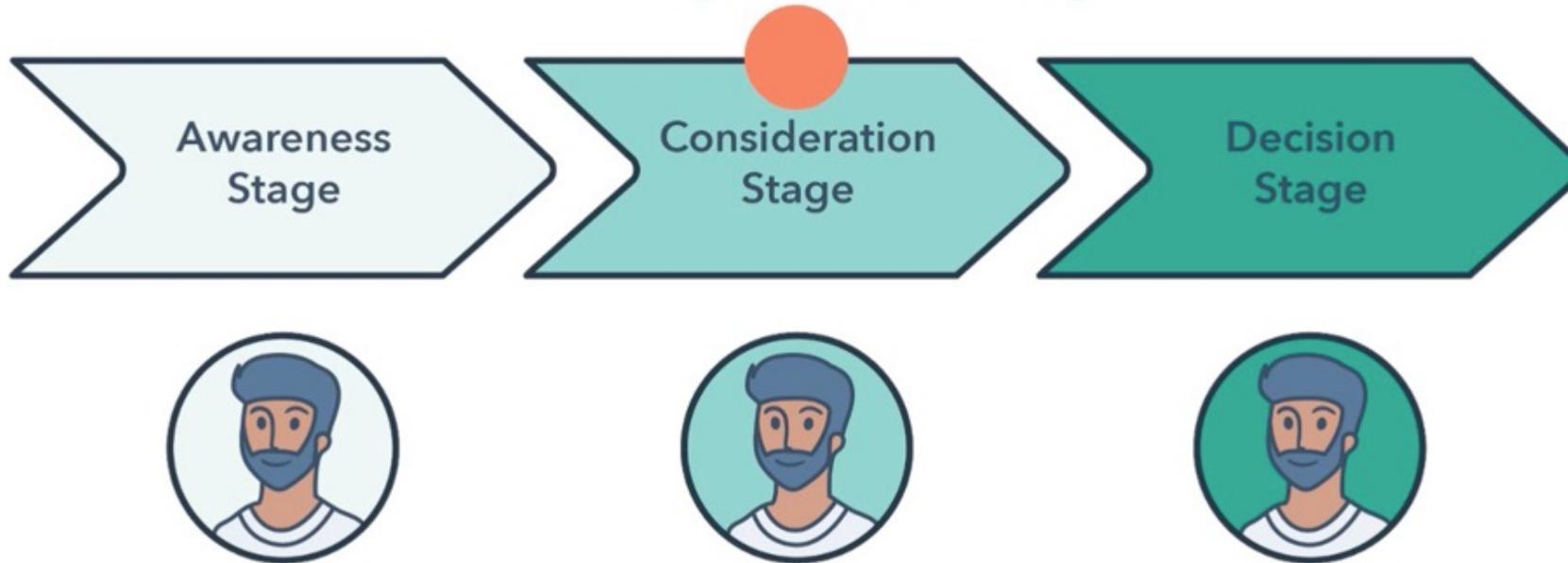
ASSUMPTIONS



You must have a solid strategy:

- Who are your ideal customers?
- What are their goals, pains, and aspirations?
- What are their buying triggers?
- What info do they need to make decisions?
- How does this change throughout their journey?

The Buyer's Journey



This is broken down into three stages: the buyer becomes **aware** of their challenge or goal, they **consider** solutions to help, and finally **decide** which brand can provide that solution.

Lead Gen Tools According to HubSpot



Features in HubSpot specifically for Lead Gen:

- Landing pages
- Forms
- Emails
- Reporting
- CRM

Lead Generation Process



VISITOR

LEAD

CUSTOMER



**HubSpot's advantage is
all of your lead gen tools
are in one place**



**Let's talk about 17 ways
you can use these tools to
generate more leads!**



1. Landing Page + Lead Magnet Funnel

The landing page features the Simple Strat logo in the top left. The main heading is "HubSpot Happiness Awaits". Below this, a paragraph explains that HubSpot can be a catalyst for growth or a waste of money, depending on the user's approach. A form asks for an email address (example: alisonannes@hotmail.com), organization type, and industry. A "SEND MY COPY!" button is at the bottom right of the form. On the left, a graphic shows "10 THINGS TO TACKLE BEFORE BUYING HUBSPOT". At the bottom, three benefit boxes are listed: "Get Started Easily", "Get Results Fast", and "Avoid Wasting Money".

HubSpot Happiness Awaits

For some, HubSpot is a major catalyst for growth. For others, it's a huge waste of money. The tips in this guide can make all the difference.

Email*
alisonannes@hotmail.com

Which best describes your organization?*

Please Select

Industry*

- Please Select -

[SEND MY COPY!](#)

Get Started Easily

Follow the 10 steps in this guide and you'll have everything you need to make onboarding a breeze.

Get Results Fast

This guide is packed with actionable tips to help you hit the ground running, including 3 quick-win strategies.

Avoid Wasting Money

HubSpot is one of the best tools, but it's not necessarily the cheapest. Learn how to make every penny of your investment count.

The thank-you page features the Simple Strat logo in the top left. The main heading is "Thanks Ali, you're awesome!". Below this, a paragraph says "Your free checklist is zooming to your email inbox as we speak. But if you're in a hurry, click the button below to download it now. Cheers!". A "DOWNLOAD NOW" button is centered. At the bottom, a section titled "Wait, there's more free stuff down here!" offers a free 30-minute phone consultation with a strategist. A "LET'S DO IT!" button is below this offer. An image of a man at a laptop is on the right. A "Return to SimpleStrat.com" link is at the bottom right.

Thanks Ali, you're awesome!

Your free checklist is zooming to your email inbox as we speak. But if you're in a hurry, click the button below to download it now. Cheers!

[DOWNLOAD NOW](#)

Wait, there's more free stuff down here!

Have questions about HubSpot, getting onboarding help from a HubSpot Partner Agency like us, or anything else related to inbound marketing? Sign up for a free 30 minute phone consultation with one of our strategists!

[LET'S DO IT!](#)

[Return to SimpleStrat.com](#)



1. Landing Page + Lead Magnet Funnel

Sequences

Manage

Analyze

Scheduled

10 things



Owner: Any



NAME



v1 10 Things Before Buying HubSpot Follow Up



v2 10 Things to Tackle Before Buying HubSpot Follow Up

Edit template



Name: 10 things before buying HubSpot email 01 v2

Owner: Will DePeri

Subject: Want to learn more about HubSpot?

Shared with everyone

No folder

Hi **Contact: First name**,

Thanks for downloading our free guide, **10 Things to Tackle Before Buying HubSpot**. Do you want to know if HubSpot would be a good fit for you and **Contact: Company name**?

Simple Strat is a Diamond HubSpot Solutions Partner - we help our clients get the most out of HubSpot by assisting them in setup, training them on best practices, and encouraging user adoption. You can even leverage our knowledge and expertise to get free purchase assistance, where we'll help you decide which product mix and tiers are right for you.

Feel free to **grab some time in our calendar** to chat and pick our brains.

Thanks!

B I U T More | Personalize Insert

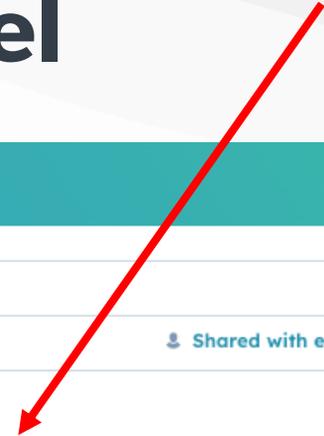
Your signature will be included when you use this template. [Edit signature](#)

Save as new template

Update existing template

Cancel

This email looks fantastic!



2. Pop-Up CTAs on High Traffic Pages

The screenshot shows the HubSpot interface with the 'Marketing' menu open. The 'CTAs' option is selected, and a sub-menu is visible with options: Ads, Email, Landing Pages, SMS, Social, Website, Campaigns, Files and Templates, and Lead Capture. Below the menu, there is a search bar for CTAs and a table listing templates. One template is visible: 'Template_Webinar Checklist', which is published and embedded.

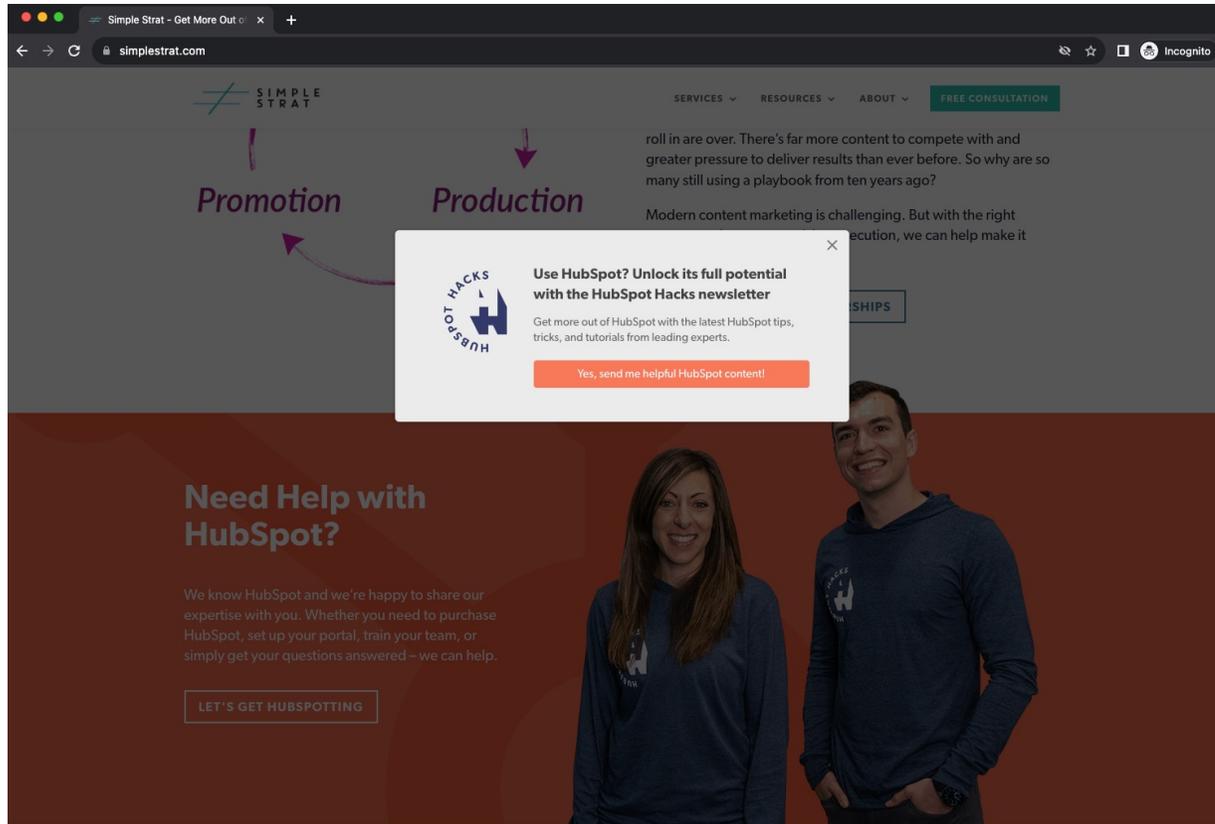
NAME
Template_Webinar Checklist
Published Embedded

The screenshot shows the HubSpot CTAs template gallery. It features a 'Get Started' section with 'HubSpot Templates' and 'Start from scratch'. Below this, there are four template cards under the 'Content' section:

- Webinar 10% Offer Pop-up**: A pop-up with a laptop and a '10% OFF YOUR NEXT WEBINAR' offer.
- Webinar Registration Pop-up**: A pop-up titled 'Advertising behind the scenes' with a registration form.
- Download Email Templates**: A pop-up titled 'Jump start your email campaign' with a form to download templates.
- Download Free eBook Pop-up**: A pop-up titled 'Download our free eBook' with a form to download an eBook.



2. Pop Up CTAs on High Traffic Pages



198
89
949
0
645



3. CTAs for Interest/Follow Up with an Event

<input type="checkbox"/>	 Inbound Survey 2023 - Not Going ● Published Embedded	785	25	3.18%
<input type="checkbox"/>	 Inbound Survey 2023 - Going ● Published Embedded	784	16	2.04%

[View in browser](#)



HUBSPOT HACKS

INBOUND Is Almost Here!

INBOUND, HubSpot's annual conference about all things growth is only a few weeks away! Our team will be heading to Boston for the festivities, will we see you there?

Take our one-click survey:

I'LL BE THERE! **NOT THIS YEAR**

- Use a workflow to put people in a specific follow up
- in person = task to reach out to book a meeting if they fit our ICP
- Not this year = make sure they get our INBOUND recap

4. Social Posting to Individual Profiles on LI

New Contacts ⓘ

Activity between 10/1/2023–11/15/2023

Date range: This quarter so far | Frequency: Daily

● LinkedIn

45



Top posts

Filter by: **Most interactions** ▾



Unlock the secrets of effective marketing with **HubSpot!** Dive into our latest video where we break down the essentials of using HubSpot to engage...
Published Oct 24, 2023 11:03 AM



Link preview

INTERACTIONS
48

CLICKS
22

IMPRESSIONS
N/A

SHARES
N/A



4. Social Posting to Individual Profiles on LI

Exit Save draft ✓ Last saved 9:50 AM Create new social posts

Learn More ▾ Edit Review

Select accounts

Ali Schwanke X

Create your posts

Draft in

Ali Schwanke + -

Need to get a handle on your lead sources as you're planning for 2024? Don't miss this master class over on our YouTube Channel - <https://youtu.be/b12DFRr3gVA?feature=shared> 2827

Add media

 A Master Class in HubSpot Lead Source Tracking
Are you looking for ways to better understand where your leads are coming from in HubSpot? By mastering HubSpot lead sources you can pinpoint where to invest...
<https://www.youtube.com/watch?feature=shared&v=b12...>

Publishing options

Publish now Schedule for later

Date: 11/15/2023 Time: 11:09 AM

Choose a time from your defaults

11:09 AM 2:09 PM 4:54 PM

Default time zone: UTC-06:00

Campaign

HubSpot Hacks

Previews may display differently when posted.

Scheduled
Wednesday, November 15, 2023 11:09 AM

Ali Schwanke

Ali Schwanke now -

Need to get a handle on your lead sources as you're planning for 2024? Don't miss this master class over on our YouTube Channel - <https://youtu.be/b12DFRr3gVA?feature=shared>

 Mastering HubSpot Lead Sources

A Master Class in HubSpot Lead Source Tracking
youtu.be

Like Comment Share Send

Alexis Eaglin

All the tips coming your way this week! From progressive forms to HubSpot's SEO page checklist and exit-intent popups, discover a number of ideas to level up your lead gen in 2024. Join us

<https://hubs.ly/Q028KT4F0>

 17 Ways to Get More Leads Using HubSpot
Wednesday, November 15 | 12pm CST / 1pm EST
PRESENTED BY ALEXIS SCHWANKE

Link preview
Created by You

Published at
Nov 13, 2023 2:54 PM

Campaign
Flywheel Fuel Webinar Series

HubSpot Tracked Clicks	Interactions
1	2

Clone

15 Alexis Eaglin - 2:54 PM

14



5. Optimize your blogs for leads from search

The screenshot displays a content management system interface for a blog post titled "Thought Leadership Tactics: The Complete List". The interface includes a top navigation bar with "Exit", "File", "Edit", "View", "Settings", and "Help" menus, and a right-side bar with "Save", "Preview", and "Update" buttons. The main content area shows the blog post header with the Simple Strat logo, navigation links for "SERVICES", "RESOURCES", and "ABOUT", and a "FREE CONSULTATION" button. The post title is "Thought Leadership Tactics: The Complete List", posted by Tyler Samani-Sprunk on August 16, 2023. The post content discusses generative AI and thought leadership. Two red boxes highlight SEO recommendation panels. The left panel, titled "Recommendations", provides guidance on topic selection, subtopic keywords, and content ideas. The right panel, also titled "Recommendations", lists specific SEO checks such as header, title, meta description, image alt text, links, mobile friendliness, and crawling/indexing.

Left Panel Recommendations:

- You're writing about the topic:** Thought Leadership
- Subtopic Keyword:** thought leadership tactics
- Consider adding these ideas to your content:** thought leadership content, thought leadership content strategy, thought leadership marketing
- Topics:**
 - Title mentions thought leadership tactics
 - Link page to topic pillar page
 - Meta description mentions thought leadership tactics
 - Use subtopic phrases in page body

Right Panel Recommendations:

- Header:
- Title:
- Meta Description:
- Images: Add missing or blank image alt text
- Links:
- Mobile Friendliness:
- Crawling and Indexing:

6. Use workflow templates

[Back to workflows](#)

Discover workflow templates

Search workflow templates

Create from scratch

Discover NEW

Available with your plan

All templates

Available with your plan

Recently used templates

Hub Plan

Marketing Hub

Ops Hub

Sales Hub

Service Hub

Objective

Manage payments NEW

Convert leads

Data cleanup

Follow up

Gather insights

Nurture relationships

Promote something

Share meeting details

Support customers NEW

Suggest new templates
Share what templates you'd like to see in the library using this [1-minute survey](#)

Onboard customers after successful payment NEW

Tell deal owners when you receive payments NEW

Tell contact owners when leads interact with your website

Send re-engagement email to cold leads

Email website visitors based on page visited

Create and assign tasks when a new deal is created POPULAR

Remind customers to renew their subscriptions NEW

Send an email series when a form is submitted POPULAR

Send welcome email to new blog subscribers

« First < Prev Next > Last »

Discover templates for you

Recommended for you

Templates available with your plan.

[See all](#)

Onboard customers after successful payment NEW

Tell deal owners when you receive payments NEW

Tell contact owners when leads interact with your website

Popular

[See all](#)

Create and assign tasks when a new deal is created POPULAR

Send an email series when a form is submitted POPULAR

Send welcome email to new customers POPULAR

Best for data cleanup

[See all](#)

Capitalize contacts first and last names POPULAR

Correct invalid ".con" email addresses with ".com" POPULAR

Remove special characters from a phone number POPULAR

Best for follow-ups

[See all](#)

Onboard customers after successful payment NEW

Send re-engagement email to cold leads POPULAR

Send an email series when a form is submitted POPULAR

7. Promo email with specific page visit

Email website visitors based on page visited ✕

Purpose:
Send an email to create awareness for your new product or service after customers visit your website. Consider sending an announcement email, launch email, etc.

What you'll need to prepare:

- The website URL that will trigger this workflow
- The follow-up email you plan to send

[Use template](#)

✔ Compatible with your [HubSpot plan](#)

Template preview

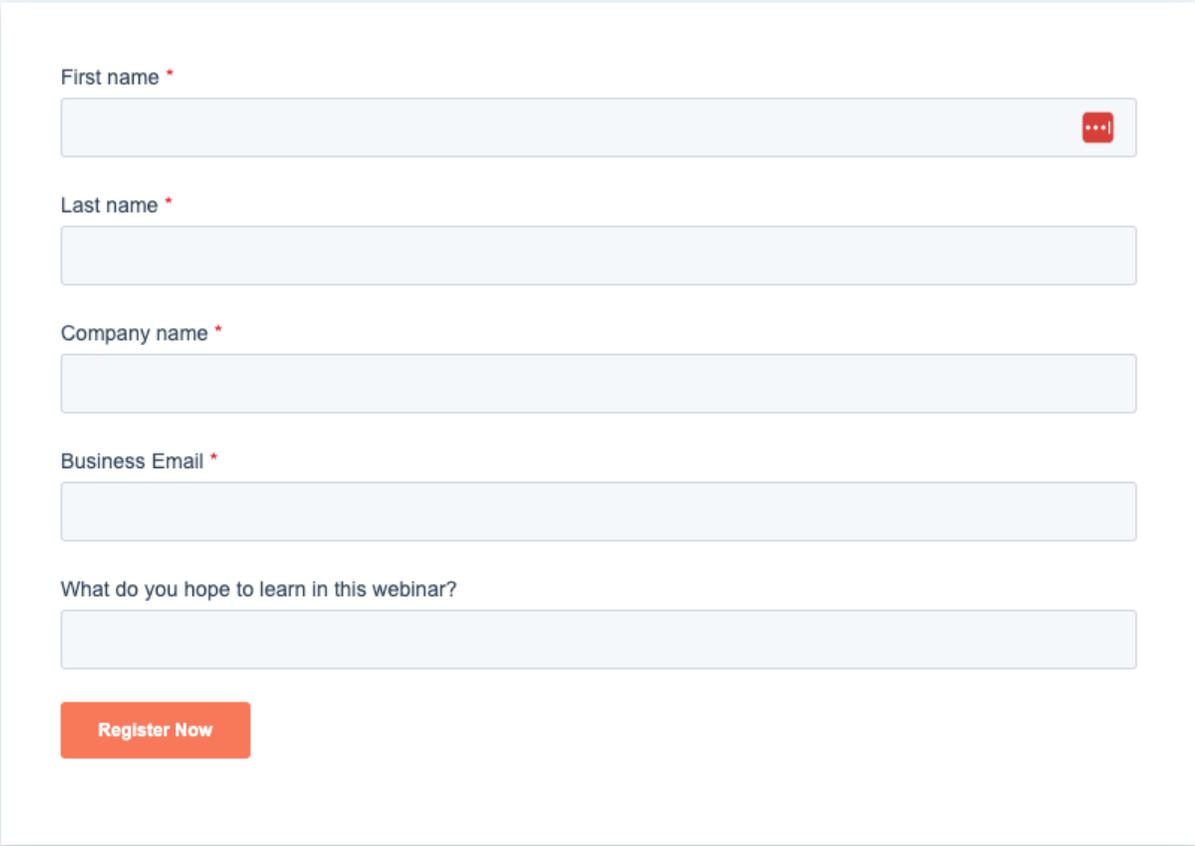
Trigger ⓘ

Someone visits a specific page on your website

Wait one hour

Send a promotional email

8. Use Qualifying Questions in Your Forms



First name *

Last name *

Company name *

Business Email *

What do you hope to learn in this webinar?

[Register Now](#)

- Other ideas:
 - Which best describes you?
 - Which is your biggest challenge?
 - How soon are you looking to solve this problem?

9. Use Progressive Forms to Gather More Intel

Question to ask yourself and your team:

- What, if you knew it, would help you accelerate a lead toward a sale?
- Or what would help you understand them better to nurture with the right content?

▼ Queued progressive fields (2)

Replace fields that a user has filled in on an earlier form with a new set of fields. They appear at the bottom of your form and in the order shown below. You can reorder them by dragging and dropping them into place. You can only use contact properties in queued progressive fields.

HubSpot Subscription Level *hubspot_subscription_level* Contact Property Progressive field

Free

Starter

Professional

Enterprise

What is your top marketing challenge at the moment? *top_marketing_challenge_lead* Contact Property Progressive field

Please Select ▼

Drag and drop a form field here

10. Sync Your HubSpot Data for Ad Targeting



[Back to lists](#)

Create a list

 **Contact-based**
Create a list of Contact records

 **Company-based**
Create a list of Company records

 **Deal-based**
Create a list of Deal records

List name *

LinkedIn Company Targeting List

What kind of list are you creating?

- Active list 152 of 1,200 used
Active lists automatically update over time. Records will join or leave the list as their properties change.
- Static list 61 of 1,200 used
Static lists do not automatically update as your records change. A static list represents a single moment in time.

[Back to lists](#)

LinkedIn Company Targeting List

Active list Estimated size: 7,602 companies 

Filters

 Test company 

Group 1  

Lifecycle stage is none of Customer 

AND

+ Add filter

OR

+ Add filter group

Edit filter

[Close editor](#)

Lifecycle stage  

is none of 

Customer  

Include records where "Lifecycle Stage" is empty



10. Sync Your HubSpot Data for Ad Targeting

< | Create company list audiences

Company List
How does company list syncing work? [Learn more](#)

LinkedIn Company Targeting List

Total companies that will be sent ⓘ
7,602

Ad account
Simple Strat x

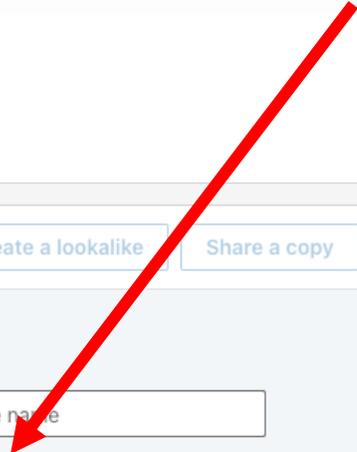
Name

Audiences

Matched | Saved

Create audience | Create a lookalike | Share a copy | Delete | Add to Campaign | Insights

<input type="checkbox"/>	Audience name ↕	Status	Source
	<input type="text" value="Search by audience name"/>	All	All
<input type="checkbox"/>	SS_LinkedIn All Companies Excluding Customers ⓘ	Building	Third-party: HubSpot
<input type="checkbox"/>	HubSpot - all non-subscribers in database	Building	Third-party: HubSpot



11. Re-engage gray mail (unengaged contacts)

Don't send to ⓘ

Select lists or contacts

Don't send to **unengaged contacts (1,461)** ⓘ

← Back to Sequences New Sequence

Start from scratch
Start with a blank sequence and add your own emails and tasks.

Start with a pre-made sequence

Recent Conversion
A prospect has downloaded content from your website and you want to reach out.

Event Follow-Up
A sequence designed to follow-up with a prospect you met at a trade show or conference.

Product or Demo Request
A prospect has indicated that they want to learn more about your product.

Preview

Sequence summary

TOTAL STEPS	DAYS TO COMPLETE	AUTOMATION	UNENROLL CRITERIA
0	1	0%	2

Step 1
Choose the next action that the sequence will perform

Automated email
Automatically send an email for me

Manual email task
Get a task reminder to send an email

Call task
Get a task reminder to make a call

General task
Set a general task reminder

InMail task
Get a task reminder to send an InMail

Connection request task
Get a task reminder to send a request

↓
Completed

Edit template ✕

Name: Webinar Intro_Webinar Questions **Owner:** Ali Schwanke

Subject: Wednesday - input or ideas? 👤 Shared with everyone - 📁 No folder -

Hi **Contact: First name**,

I saw you're signed up for the AI webinar this week. Just reaching out to say hello and nice to meet you.

Are there any topics or questions you want to make sure we cover? Or challenges/specific use cases you're struggling with that we can touch on? Let me know and we'll make sure to incorporate.

Talk soon,

B I U Tx More - **Personalize -** **Insert -**

👤 Your signature will be included when you use this template. [Edit signature](#)

Update existing template **Save as new template** **Cancel** This email looks fantastic!



12. Use HS forms for quizzes and lead activities



SIMPLE STRAT

Super Fun Prop Sheet for the Big Game!

Prize: \$50 Gift Card!

First name *

Email *

How long will it take Chris Stapleton to sing the US National Anthem? (From "Oh" to the end of "Brave") *

1 point

Under 125 seconds

Over 125 seconds

Will Chris Stapleton play the guitar while he sings the National Anthem? *

1 point

Yes

No

Will the coin toss be heads or tails? *

1 point

Heads

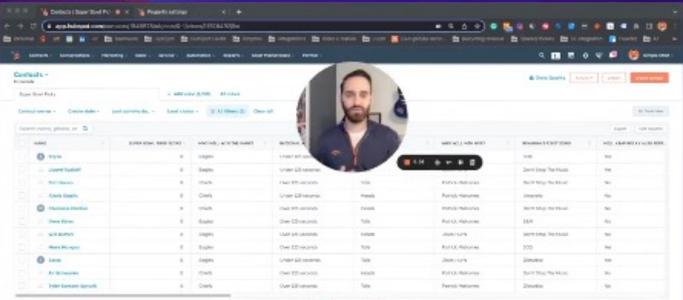
Tails

 **Will DePeri** (He/Him) · 1st
HubSpot Solutions Partner // Senior HubSpot Consultan...
9mo · 🌐

How can you combine #HubSpot and the #SuperBowl into a super fun team event?

EASY - I used HubSpot lead scoring to calculate the results of our Super Bowl prop sheet.

Learn how to set up lead scoring in HubSpot and who the winner of our prop sheet was in the video below!



👍🌍 20 5 comments · 6 reposts

 Like  Comment  Repost  Send

[View on LinkedIn:](#)



13. Use A/B Testing in Sequences

TEST sequence 

Steps Settings Automation

Sequence summary

TOTAL STEPS	DAYS TO COMPLETE	AUTOMATION	UNENROLL CRITERIA
1	1	100%	2

Actions 

1. Automated Email - Day 1

  Version A - Inbound 23 Invite 2

Meet at INBOUND?

Hi **Contact: First name**, Any thoughts on meeting up at INBOUND next week? Cheers,

[See more](#)

 Version B - Inbound 23 Invite 1

Meet at INBOUND?

Hi **Contact: First name**, I saw from the one-click survey in our recent HubSpot Hacks newsletter that you'd be heading to

[See more](#)

[+ Add A/B test](#)

Step performance

STEP NAME 	EXECUTED STEPS 	MEETINGS 	OPENS 
 Step 1 Automated email			
A: Webinar_AI_email 1_Version A_Register	45	0%	20%
B: Webinar_AI_email 1_Version B_Invitation	60	0%	25%



14. Enroll new contacts in “indoctrination” series

Send an email series when a form is submitted ✕

Purpose:
Thank visitors after their first form submission. Show them you care by sending a welcome email followed by another email that contains valuable content such as an ebook, or a link to a popular blog post or news article.

What you'll need to prepare:

- The welcome email you want to send
- The follow-up lead nurture email you want to send

[Use template](#)

✔ Compatible with your [HubSpot plan](#)

Template preview

```
graph TD; Trigger[Trigger] --> Send[Send a welcome email]; Send --> Wait[Wait 3 days]; Wait --> More[+ 1 more action];
```

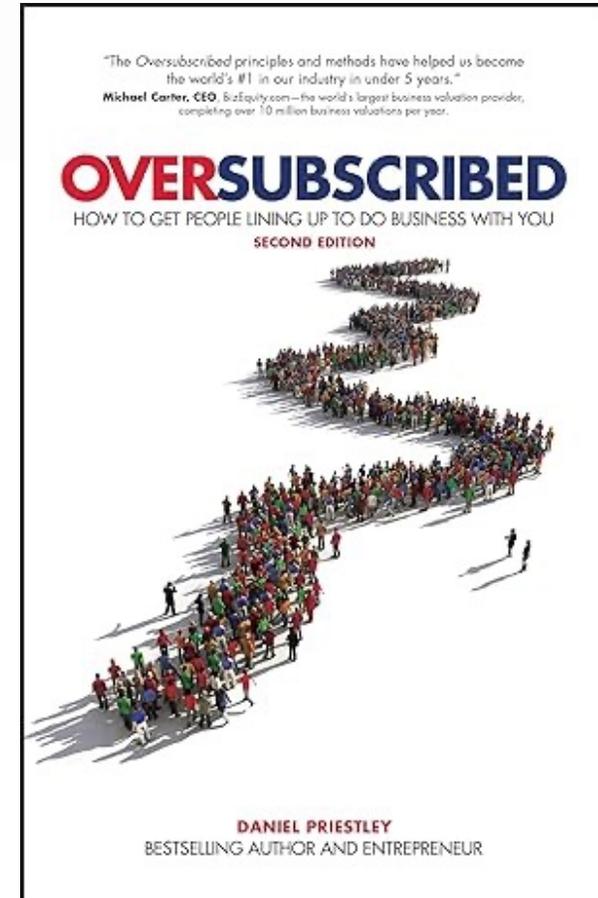
The flowchart illustrates the sequence of actions for the email series. It starts with a 'Trigger' box containing the text 'A lead who found your website through an online source fills...'. This is followed by a 'Send a welcome email' box, then a 'Wait 3 days' box, and finally a box labeled '+ 1 more action'.

14. Enroll new contacts in “indoctrination” series

Based on the information provided, what would help them know you faster?

In Oversubscribed, the author talks about the 7-11-4 rule in terms of how we form connections - his principal focuses on time, interactions and locations.

So, you need to have spent 7 hours, across 11 interactions, in 4 locations to form a bond.



15. Host virtual events synced with HubSpot

FF_11-15-23_Webinar Reg_17 Ways to Get More Leads Using HubSpot

Actions Settings and notifications Goals Changes

Contact enrollment trigger

Enroll contacts when they meet these filters:

Group 1

Form submission

- has filled out **Flywheel Fuel_Webinar Form on Webinar - Register_17 Ways to Get More Leads Using HubSpot_11-15-23**

Show details

1. Add Contact to Zoom Webinar

Add Contact to Zoom Webinar

2. Set marketing contact status

Set as marketing contact

All lists > All folders > Webinars > Flywheel Fuel > FF_11-15-23_Webinar Reg_17 Ways to Get More Leads Using HubSpot

FF_11-15-23_Webinar Reg_17 Ways to Get More Leads Using HubSpot

Active list Size: 111 contacts Last contact added: November 15, 2023 9:40 AM

Filters Performance

Filters

Test contact Edit filters

Group 1

- Email doesn't contain any of @simplestrat.com

AND

- Last name doesn't contain any of Eaglin, Schwanke, DePeri, Estes, Rudloff, or Mangus

AND

- At least one Zoom: Webinar Registration Event has all of:
 - Webinar Id is equal to any of 86136915584

CREATE DATE	ORIGINAL SOURCE	ORIGINAL SOURCE DRILL-DOWN 1	LATEST SOURCE	LATEST SOURCE DRILL-DOWN 1	LATEST SOURCE DRILL-DOWN 2
Yesterday at 2:14 PM	Email marketing	flywheel fuel webinar series	Email marketing	flywheel fuel webinar series	Webinar Registration
Yesterday at 6:48 AM	Direct traffic	blog.simplestrat.com/17-signs-your-...	Organic search	Unknown keywords (SSL)	GOOGLE
Yesterday at 5:40 AM	Organic search	Unknown keywords (SSL)	Email marketing	flywheel fuel webinar series	Webinar Registration
Nov 13, 2023	Organic Social	Reddit	Organic Social	Reddit	--
Nov 13, 2023	Organic Social	LinkedIn	Email marketing	flywheel fuel webinar series	Webinar Registration
Nov 12, 2023	Organic Social	LinkedIn	Email marketing	flywheel fuel webinar series	Webinar Registration
Nov 11, 2023	Organic Social	YouTube	Email marketing	flywheel fuel webinar series	Webinar Registration
Nov 9, 2023	Organic Social	YouTube	Email marketing	flywheel fuel webinar series	Webinar Registration
Nov 9, 2023	Organic Social	YouTube	Email marketing	flywheel fuel webinar series	Webinar Registration
Nov 8, 2023	Organic Social	YouTube	Direct traffic	simplestrat.com/content-partnerships	--
Nov 7, 2023	Organic Social	YouTube	Email marketing	flywheel fuel webinar series	Webinar Registration
Nov 6, 2023	Email marketing	flywheel fuel webinar series	Email marketing	flywheel fuel webinar series	Webinar Registration
Nov 5, 2023	Organic Social	YouTube	Email marketing	flywheel fuel webinar series	Webinar Registration
Nov 4, 2023	Organic Social	YouTube	Email marketing	flywheel fuel webinar series	Webinar Registration
Nov 3, 2023	Direct traffic	blog.simplestrat.com/hubspot-sequ...	Email marketing	flywheel fuel webinar series	Webinar Registration
Nov 3, 2023	Organic search	Unknown keywords (SSL)	Email marketing	flywheel fuel webinar series	Webinar Registration
Nov 3, 2023	Organic Social	LinkedIn	Organic Social	LinkedIn	--
Nov 1, 2023	Direct traffic	info.simplestrat.com/webinar-new-n...	Email marketing	flywheel fuel webinar series	Webinar Registration
Oct 31, 2023	Organic Social	LinkedIn	Organic Social	LinkedIn	--



15. Host virtual events synced with HubSpot

AND
At least one Zoom: Webinar Registration Event has all of:
• Webinar Id is equal to any of 83014807448
AND
At least one Zoom: Webinar Attendance Event has all of:
• Occurred is equal to 06/07/2023 (UTC)

Specific follow up messages based on attendance:

Did attend – “Did you get your questions answered? Would you like to schedule a call with a HubSpot specialist?”

Did not attend – “Here are some of the key takeaways” – nurture and then ask for a call

16. Identify easy touch points for templates

Edit template ✕

Name: Agency Introduction for Partner Meeting - from event **Owner:** Ali Schwanke

Subject: Introduction 👤 Private 📁 No folder

Hi Contact: First name,

This is Ali Schwanke - we met at the (EVENT NAME AND WHEN). It was nice meeting you and getting to talk to you about (TOPIC).

I'd love the opportunity to connect with you soon to learn more about your company and the types of clients you serve, as well as share more about us in case you might know companies who could benefit from our help.

Would you be open for a short meeting or call in the next week or so?

My cell is listed below in case you'd rather chat vs. email :)

B I U T More **Personalize** **Insert**

🔗 Your signature will be included when you use this template. [Edit signature](#)

Update existing template **Save as new template** **Cancel** 1 Content suggestions

Edit template ✕

Name: C54 San Diego Meetup **Owner:** Ali Schwanke

Subject: C54 Meetup San Diego Mar 24? 👤 Shared with everyone 📁 No folder

Hi Contact: First name,

I'm reaching out as we're both part of Collective 54 and I'll be in San Diego March 23 and 24 and wanted to see if you may be interested in a meetup with other members in the area?

I've reached out to a few folks but if a group doesn't work out, even a 1-on-1 lunch or coffee would be great to get to know each other and learn about our businesses a bit more.

Interested? I'm hoping to nail down plans and travel soon as I'm in town for an event anyway. Appreciate it!

B I U T More **Personalize** **Insert**

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Update existing template **Save as new template** **Cancel** ✔ This email looks fantastic!



16. Identify easy touch points for templates

Edit template ✕

Name: General - Get More Out of LinkedIn **Owner:** Ali Schwanke

Subject: Pick my brain about LinkedIn 👤 Shared with everyone - 📁 No folder -

Hey **Contact: First name** ,

I'm reaching out to share a resource that may be helpful to you and your team, especially if you're wanting to generate better results, engagement, leads, etc on LinkedIn ➡ <https://blog.simplestrat.com/guide-to-better-results-on-linkedin>

What this covers:

- What most are doing wrong on the platform
- Why audience is more important than what you have to say
- LinkedIn prompts to use if they don't know what to post about
- The importance of engagement

+ more

B I U T_x More - | **👤 📁 Personalize -** **Insert -**

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1 Content suggestions

Edit template ✕

Name: LinkedIn Convo Follow Up **Owner:** Ali Schwanke

Subject: Follow up from LinkedIn Convo 👤 Shared with everyone - 📁 No folder -

Hey (name)

I'm reaching out to follow up on our conversation from LinkedIn. I'd love to explore (insert topic) further and see how we may benefit from knowing more about each other's companies, and potentially collaborate or work together in some capacity.

Feel free to **book directly on my calendar here** or shoot me a link to your availability and we'll get it nailed down.

Looking forward to it. Talk soon!

B I U T_x More - | **👤 📁 Personalize -** **Insert -**

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2 Content suggestions



17. Generate leads through reviews/referrals

< Back to all sequences

HubSpot Review Request

Owner: Will DePeri Actions Enroll contacts

Performance **Enrollments** Steps Settings Automation

Company - Status - Enrolled by - Enrollment date: MM/DD/YYYY to MM/DD/YYYY

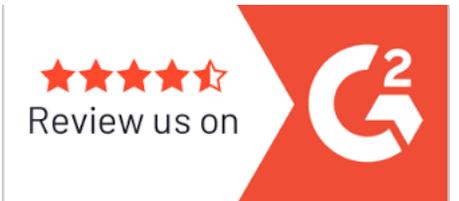
Metric	Value	Count
TOTAL ENROLLMENTS	11	11 Contacts
MEETING RATE	36.36%	4 Meetings Booked
REPLY RATE	63.64%	7 Replies
OPEN RATE	81.82%	9 Opens
CLICK RATE	0%	0 Clicks
BOUNCE RATE	0%	0 Bounced
NO RESPONSE	9.09%	1 No Response

[See all](#)

Step performance

Rates Counts

STEP NAME	EXECUTED STEPS	MEETINGS	OPENS	CLICKS	REPLIES	TASKS COMPLETED
 Step 1 Automated email HubSpot Review Request 01	11	27.27%	81.82%	0%	45.45%	-
 Step 2 Automated email HubSpot Review Request 02	2	50%	100%	0%	50%	-
 Step 3 Automated email HubSpot Review Request 03	1	0%	100%	0%	0%	-



Analyzing Next Steps: Framework

Lead Gen Strategy	How we could use HubSpot to do this	What we'd need to do this:	Effort level	Need external support?	Timeline
Getting more referrals	Send 1x/month referral request	Referral template; knowing who to send referral to (don't have a property for this)	1	yes	Q1
Getting more referrals	Send 10 review requests per rep per month	Review template based on platform; tracking of who we've asked	2	yes	Q3
Getting more leads from high traffic pages	Pop up conversion for our newsletter	Pop up form; compelling offer to get on the newsletter; subscriptions	1	no	Q1

Before jumping in:

1. Gather ideas – start with the question.... “How might we _____?”
2. Look at what’s working vs not working
3. Explore your current HS level vs what’s an upgrade
4. Acknowledge time and resources
5. Seek help where needed

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Getting the Most Out of HubSpot's November 2023 Product Updates



PRESENTED BY
TYLER SAMANI-SPRUNK

Q&A

What questions can we answer?

